

# Bonneville Power Administration Transmission Business Line

## **Customer Web Interface**

## **Transmission Scheduling**

## **User's Guide**

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# 1 Introduction

Customers can access Transmission and Demand Schedules and do any or all of the following:

- View all accounts
- Manage their account with BPAT
- Perform multiple queries
- Filter using Source, Sink, TCH, Product, special characters, and day/date
- Submit schedules for Preschedule and Real-Time

**Should you have questions, review Section 6 for Hints, Tricks, and Frequently Asked Questions.**

## 1.1 Purpose

The purpose of this document is to guide customers in their use of the Customer Web Interface (CWI) Transmission and Demand Schedule.

## 1.2 Hardware/Software Requirements

- Internet Explorer (IE) 5.0 or higher
- Browser should have Javascript and cookies
- Browser must have SSL enabled (128 bit encryption, which is the default for most IE installations)
- Access to the Internet
- Screen resolution of 1024 x 768 or higher recommended

Note: Cookies are not persisted across logins and are used only for login and session management. See <http://www.bpa.gov/support/disclaimer.html> for BPA's policies.

### 1.3 URL for CWI

The URL for the Customer Web Interface is as follows:

<http://taim.transmission.bpa.gov/cwi/>

This will take you to the opening screen where you choose between Transmission and Demand, Ancillary Services, Tagging, and Miscellaneous.

To go directly to Transmission and demand, the URL is:

<http://taim.transmission.bpa.gov/cwi/tsched>

To go directly to the login screen for Ancillary Services, the URL is:

<http://taim.transmission.bpa.gov/cwi/ancsched>

Should you forget and log in using an old URL, the system will re-direct you to:

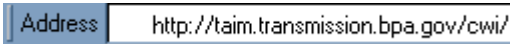
<http://taim.transmission.bpa.gov/cwi/>

## 2 Access the Transmission and Demand Schedule view of the Customer Web Interface (CWI)

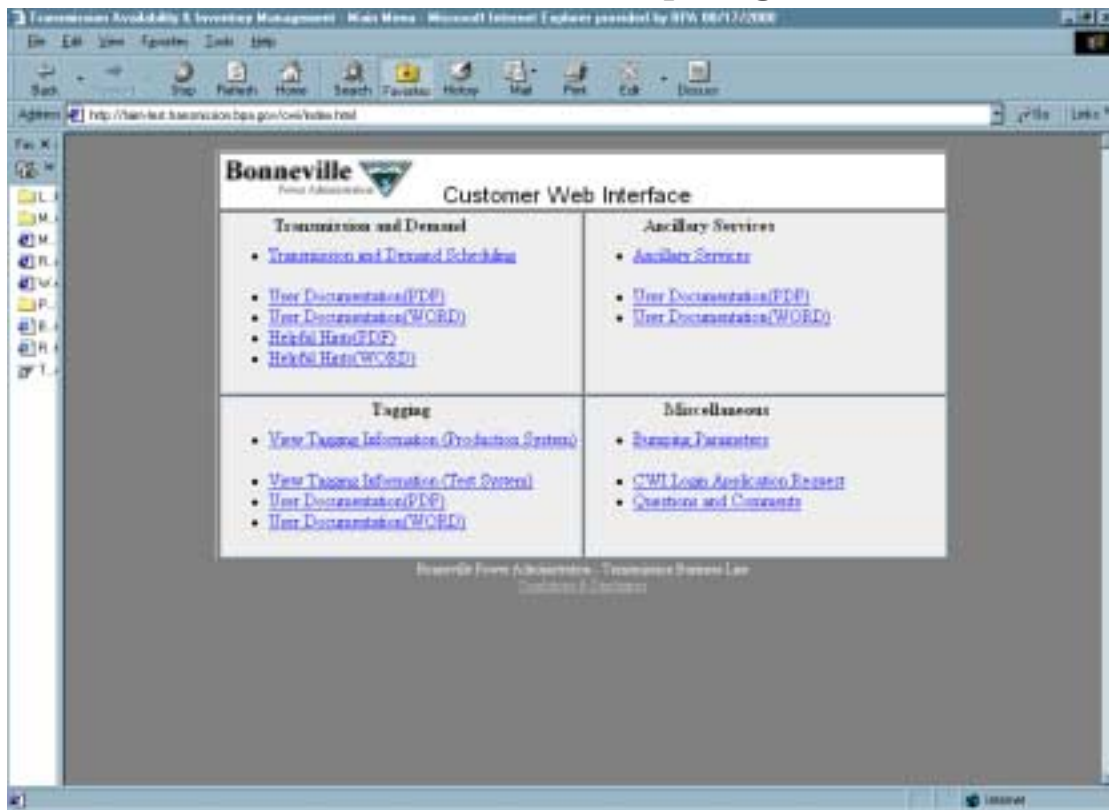
When you log on, you automatically go into a system of Secure Sockets Layer (SSL). Should you attempt to bypass this SSL, the system will redirect you to a new URL that is SSL secured. Without the 128-bit encryption SSL feature, you are unable to access the display.

When you log in to the system, but do not actively use it for 30 minutes, the system logs you off. The screen appears the same as when you left it, but you will not be able to make any entries. Instead, the system will take you back to the Login Window.

Use the following procedures to access and use the Transmission and Demand Schedule.

Step	Action	Screen Element
1	<p>Direct your web browser to the following URL: <b>http://taim.transmission.bpa.gov/cwi/</b></p> <p>The opening Customer Web Interface screen appears, and is similar to the following.</p>	

## Customer Web Interface Opening Screen



Step	Action	Screen Element
2	Click on the <b>CWI Login Application Request</b> hyperlink, under <i>Miscellaneous</i> , if you do not already have a login name and password. This takes you to the <i>CWI Login Application Request</i> screen.	<ul style="list-style-type: none"> <li><a href="#">CWI Login Application Request</a></li> </ul>

## First Part of the CWI Login Application Request Screen

**CWI On-Line Application Form**

By filling out and submitting this form, you agree to the terms, conditions, and obligations spelled out below and to submit complete and accurate information in all required fields of this form. Failure to do so may result in any one of the following:

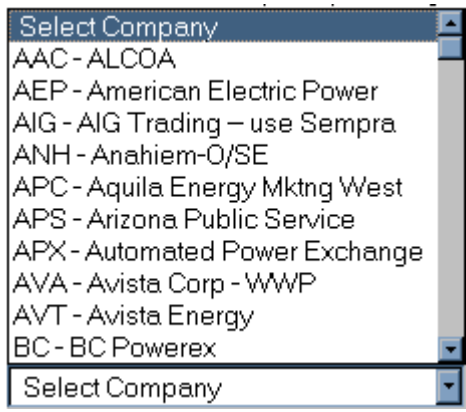
- Revocation or disabling of your CWI login
- Termination of your Sponsoring Organization's CWI enabling agreement
- Investigation if possible criminal or illegal activities are suspected

Upon submittal of this form, the Sponsoring Organization you identify below will be contacted to verify your identity and suitability for a CWI login. This process may take from one to three days, although every attempt is made to process requests within one business day. Upon approval or denial, you will be notified via phone or e-mail.

**Form key**  
★ - Designates required field

Sponsoring Organization / Transmission Customer ★

Select Company ▼

Step	Action	Screen Element
3	Note the <b>Form key</b> . A red asterisk designates the field requires an entry.	<b>Form key</b> ★ - Designates required field
4	Open the <b>Select Company</b> pull down menu and select your company name.	 <p>The screenshot shows a dropdown menu titled 'Select Company'. The list of options includes: AAC - ALCOA, AEP - American Electric Power, AIG - AIG Trading – use Sempra, ANH - Anaheim-O/SE, APC - Aquila Energy Mktng West, APS - Arizona Public Service, APX - Automated Power Exchange, AVA - Avista Corp - WWP, AVT - Avista Energy, BC - BC Powerex, and another 'Select Company' option at the bottom. The menu has a scrollbar on the right side.</p>

## Second Part of the CWI Login Application Request Screen

**Applicant Contact Information**

First Name \*      Middle      Last Name \*

Title \*      Employee (may be same as sponsor) \*

Address \*

City \*      State/Province \*      Zip Code \*

Phone \*      Fax      Email Address \*

Step	Action	Screen Element
5	Enter your <b>First, Middle</b> (optional), and <b>Last</b> names.	First Name *      Middle      Last Name *
6	Enter your <b>Title</b> .	Title *
7	Enter your <b>Employer</b> name.	Employee (may be same as sponsor) *
8	Enter your <b>Street</b> address.	Address *
9	Enter the name of your <b>City</b> .	City *
10	Open the <b>State/Province</b> pull down menu and make your selection.	State/Province * State/Province*



Step	Action	Screen Element
11	Enter your <b>Zip Code</b> .	Zip Code * <input type="text"/>
12	Enter your <b>Phone</b> number.	Phone * <input type="text"/>
13	Enter your <b>Fax</b> number. This is optional.	Fax <input type="text"/>
14	Enter your <b>Email</b> address.	Email Address * <input type="text"/>

### Requested Login Credentials Portion of the Login Request Screen

Requested Login Credentials

- Usernames and Passwords MUST be 6 characters or greater
- Usernames and Passwords MUST contain AT LEAST ONE non-alpha character, such as a number (1,2,3..) or special character (!@#\$%,?...)
- Usernames and Passwords MUST NOT contain spaces
- Usernames must be unique among all users of the CWI
- Passwords are valid for 60 days at which time you will be prompted to create a new one.

Username \* Password \* Verify Password \*

Step	Action	Screen Element
15	Follow the instructions for choosing your <i>Username</i> and <i>Password</i>	<ul style="list-style-type: none"> <li>• Usernames and Passwords MUST be 6 characters or greater</li> <li>• Usernames and Passwords MUST contain AT LEAST ONE non-alpha character, such as a number (1,2,3..) or special character (!@#\$%,?...)</li> <li>• Usernames and Passwords MUST NOT contain spaces</li> <li>• Usernames must be unique among all users of the CWI</li> <li>• Passwords are valid for 60 days at which time you will be prompted to create a new one.</li> </ul>
16	Enter your preferred <b>Username</b> .	Username * <input type="text"/>
17	Enter your preferred <b>Password</b> .	Password * <input type="text"/>

Step	Action	Screen Element
18	<b>Verify your Password</b> by entering it at <i>Verify Password</i> .	<p>Verify Password *</p> <input type="text"/>

### Access Levels Portion of the Login Request Screen

Access Levels Requested

**Note:** All approved logins automatically have view/read only privileges. If you ONLY require view/read privileges, do NOT check any of the boxes below

☐ Transmission Scheduling and Demand Account Edit Ability

☐ Ancillary Services Edit Ability

Step	Action	Screen Element
19	Click the box to the left of <b>Transmission Scheduling and Demand Account Edit Ability</b> if you require more than view/read privileges.	<input type="checkbox"/> Transmission Scheduling and Demand Account Edit Ability
20	Click on the box to the left of <b>Ancillary Services Edit Ability</b> if you require more than view/read privileges.	<input type="checkbox"/> Ancillary Services Edit Ability

## Terms and Conditions Portion of the Login Request Screen

[Terms and Conditions \(view full page\)](#)

**CUSTOMER WEB INTERFACE (CWI)  
AGREEMENT, TERMS & CONDITIONS**

Access to and use of the Bonneville Power Administration's (BPA) Transmission Business Line (TBL) Customer Web Interface (CWI) system shall be pursuant to the terms, conditions and obligations set forth below.

**Transmission Customer Security Officer**

All the information I have provided above is accurate and truthful; I have read and understand the terms, conditions and obligations set forth in the above agreement and agree to abide by them.

☐ Yes
 ☐ No

[Conditions and Disclaimers](#)

Step	Action	Screen Element
21	Click on the <b>view full-page</b> hyperlink, or scroll down, to read the <i>CWI Agreement Terms and Conditions</i> .	<a href="#">(view full page)</a>
22	Click on <b>Yes</b> or <b>No</b> to indicate your agreement to abide by the terms, conditions and obligations.	<input type="radio"/> Yes <input type="radio"/> No
23	Click on the <b>Conditions and Disclaimers</b> hyperlink to view them before submitting your application.	<a href="#">Conditions and Disclaimers</a>
24	Click on the <b>Submit</b> button to submit your request. A screen similar to the following appears.	<input type="button" value="Submit"/>

## CWI Login Application Confirmation Screen

**CWI Login Application Confirmation**

Thank you, Mary, for submitting your application for a CWI login. Your request is pending and you will be contacted within 1 to 3 business days.

**Please keep the following information for your records:**

Confirmation number: 37

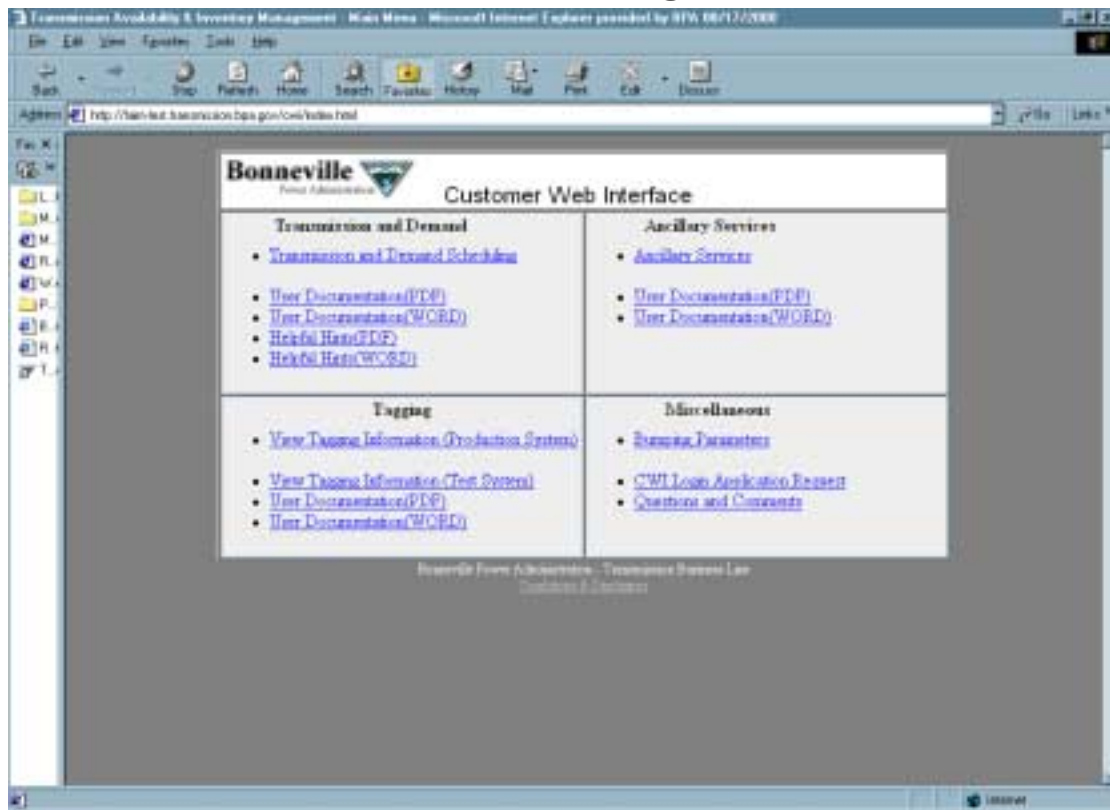
Username: Munch1

Sponsoring Organization Code: BPAT

[CWI Home Page](#)

Step	Action	Screen Element
25	Keep this information for your records. Click on the <b>CWI Home Page</b> hyperlink to return to the <i>Home Page</i> , which looks similar to the following screen.	<u><a href="#">CWI Home Page</a></u>

## CWI Home Page



Step	Action	Screen Element
26	Click on the <b>Transmission and Demand Scheduling</b> hyperlink. The <i>Login</i> screen appears, and is similar to the following.	<div> <p>Transmission and Demand</p> <ul style="list-style-type: none"> <li><a href="#">Transmission and Demand Scheduling</a></li> </ul> </div>

## Transmission Scheduling Login Screen

https://taim-test.transmission.bpa.gov/cwi/tsched - Microsoft Internet Explorer provided by BPA 08/17/2000

File Edit View Favorites Tools Help Address https://taim-test.transmission.bpa.gov/cwi/tsched

Back Forward Stop Search Favorites History

**Please Enter Login Credentials**

Name:

Password:

**WARNING**

**This computer system is owned by the United States federal government and is to be used for official purposes only.**

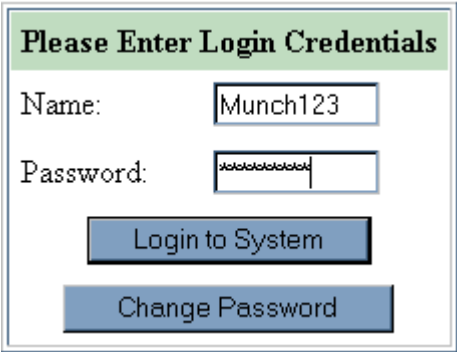
**UNAUTHORIZED ACCESS AND UNAUTHORIZED USE OF THIS COMPUTER SYSTEM ARE PROHIBITED. VIOLATORS ARE SUBJECT TO CRIMINAL AND CIVIL PENALTIES. THIS SYSTEM IS MONITORED FOR APPROPRIATE USE.**

**BONNEVILLE POWER ADMINISTRATION**

[Conditions and Disclaimers](#)

This page generated at: 10/16/2001 14:00:23 PDT

Step	Action	Screen Element
27	Enter your assigned login <i>Name</i> in the <i>Name</i> field. The login name is not case sensitive.	Name: <input type="text" value="Munch123"/>
28	Enter your assigned <i>Password</i> in the <i>Password</i> field. The password is not case sensitive.	Password: <input type="password" value="XXXXXXXXXX"/>
29	Click on the <b>Login to System</b> button. The <i>Transmission Contract Holder View</i> screen appears and looks similar to the following.	<input type="button" value="Login to System"/>

Step	Action	Screen Element
30	Note that the screen indicates you have logged in as an <i>Edit User</i> representing <i>PAC</i> .	Current Logged In User: <b>Bennett, Mary</b> Representing: <b>PPM</b>
<b>Note:</b>	When you log in to the system, but do not actively use it for 30 minutes, the system will log you off. The screen appears the same as when you left it, but you are unable to edit or search for data. Instead, the system takes you back to the Login Window. Re-enter your <b>Name</b> and <b>Password</b> .	 <p>The screenshot shows a login window titled "Please Enter Login Credentials". It contains two input fields: "Name:" with the text "Munch123" and "Password:" with masked characters "*****". Below the fields are two buttons: "Login to System" and "Change Password".</p>

## 3 Newest Features

### 3.1 Daylight Savings Time Support

You will not need to make any changes in the time settings. The system supports the appropriate time changes to and from Daylight Savings Time. For example, on October 28, 2001, the system will “fall back” one hour at 0200 hours.

### 3.2 Other New Features

1. Can now use the enter key to move from hour to hour in addition to the tab key. This should help 10-keyers.
2. When you submit edits, the display refreshes to the same page you were on before.
3. When you change your display between *Operational* and *Pending* the system displays the same page you were on.
4. A bad number cannot be submitted if you happen to hit *Submit Edits* before moving off an hour.
5. Various popup messages are now more informative.
6. The account title is now a fixed format, making it easier to read.
7. *Demand Schedules* are now *Demand Accounts*.
8. *Navigate Within Day* is now *Page Forward / Back*.
9. Improved reliability of database connections.
10. Only TCH, Network, or Intertie, can edit an account.
11. Added ability to sort accounts, both ascending and descending, based on the *Account Number, Pair*, and most of the *Title Attributes*.



## 4 Changing Your Password

Your password is good for 60 days. The following steps take you through a password change.

### Login Screen

https://taim-test.transmission.bpa.gov/cwi/tsched - Microsoft Internet Explorer provided by BPA 08/17/2000

File Edit View Favorites Tools Help Address https://taim-test.transmission.bpa.gov/cwi/tsched

Back Forward Stop Search Favorites History

**Please Enter Login Credentials**

Name:

Password:

Login to System

Change Password

**WARNING**

**This computer system is owned by the United States federal government and is to be used for official purposes only.**

**UNAUTHORIZED ACCESS AND UNAUTHORIZED USE OF THIS COMPUTER SYSTEM ARE PROHIBITED. VIOLATORS ARE SUBJECT TO CRIMINAL AND CIVIL PENALTIES. THIS SYSTEM IS MONITORED FOR APPROPRIATE USE.**

**BONNEVILLE POWER ADMINISTRATION**

[Conditions and Disclaimers](#)

This page generated at: 10/16/2001 14:00:23 PDT

Step	Action	Screen Element
1	Click on the <b>Change Password</b> button. A screen similar to the following appears.	Change Password

## Change Password Screen

**Please Enter Login Credentials and New Password**

Name:

Old Password:

New Password:

Verify Password:

**PASSWORD POLICIES**

- Must be 6 characters or greater
- Must contain at least one non-alpha character
- Can't be the same as any password used in the previous 180 days
- Are valid for 60 days

**BONNEVILLE POWER ADMINISTRATION**

[Conditions and Disclaimers](#)

Step	Action	Screen Element
2	Enter your <i>user name</i> .	Name: <input type="text" value="Munch123"/>
3	Enter your <i>old password</i> .	Old Password: <input type="password" value="XXXXXXXXXX"/>
4	Enter your <i>new password</i> .	Verify Password: <input type="password" value="XXXXXXXXXX"/>
5	Click on the <b>Change Password</b> button. In a few seconds, you will see a screen similar to the following.	<input type="button" value="Change Password"/>
6	In a few seconds, you will have a confirmation of your password change.	<div> <b>Password Changed</b>  New password will be valid for 60 days  <a href="#">LOGIN</a> </div>
7	Click on the <b>LOGIN</b> hyperlink to return to the Login screen.	<a href="#">LOGIN</a>

## 5 Use the Contract Holder View Screen

As of 10/1/01, you will be able to manage your account with BPAT using this screen to view all accounts, perform queries and filters, and submit schedules and ancillary service information.

You will make your query selections in the upper quarter of the screen. You can enter an account number and day/date, make selections from the pull down menus and day/date, or leave all menus set at <ALL> and select only the day/date. When you enter the account number, the system gives you all of the Transmission and Demand data for that account only. Selections made in the pull down menus allow you to define the extent of the information displayed. Selecting <ALL> at all menus gives you all accounts.

**You can access accounts where your company is the TCH-N or the TCH-I.**

You can search for up to five days before the current date, for the current date, and for up to five days past the current date.

In the following exercise, we will find the same account using the:


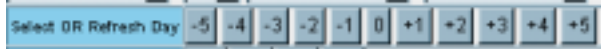
- Account Number
- Quick Filters
- All

### 5.1 Time Filter Using Account Number

The account number gives you all of the transmission or demand data for that account.

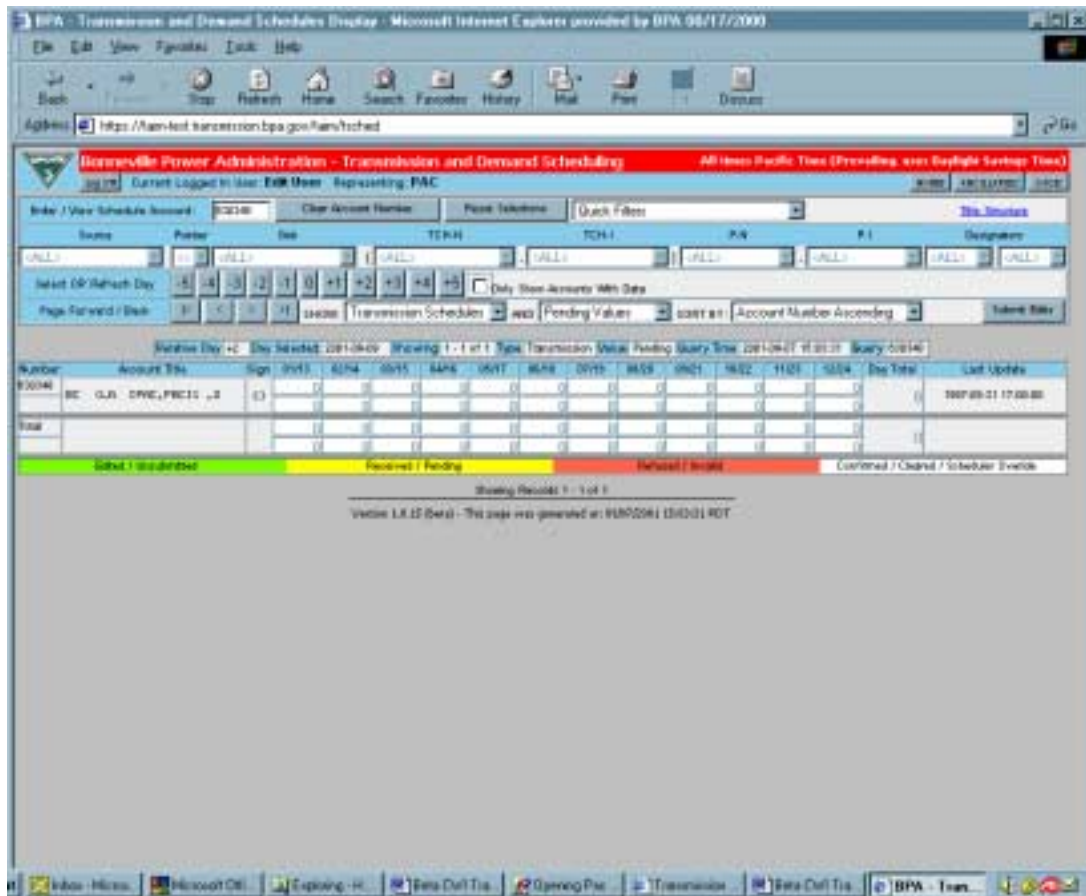
You may need to de-select the *Only Show Accounts With Data* option.

Follow these steps to filter using the account number.

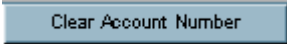
Step	Action	Screen Element
1a	Enter an appropriate account number for your company in the <i>Enter/View Schedule Account</i> field. In this case, enter <b>630348</b> .	
1b	Click on <b>Select Day +2</b> to select the <i>day/date</i> . (Select 0 for today, +1	

Step	Action	Screen Element
	for tomorrow, -1 for yesterday, etc.) A screen similar to the following appears.	

### Account Number Results Screen



Step	Action	Screen Element
1c	You located <i>Account Number 630348</i> using the account number and day.	
1d	Note the column to the right of <i>Account Title</i> indicates the <i>Sign</i> of the account, + or -. In this case, it is -.	
1e	Note that all fields, <i>Source</i> through <i>Designations</i> , are now gray. They	

Step	Action	Screen Element
	went gray when you entered the account number.	
1f	Click on the <b>Clear Account Number</b> button in order to proceed.	

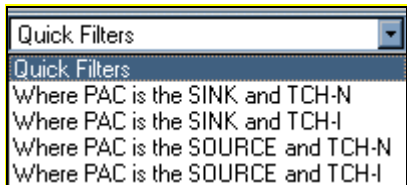

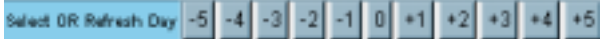

## 5.2 Use the Quick Filter

You can readily go to your company as the Sink and TCH-N, Sink and TCH-I, Source and TCH-N, or Source and TCH-I using the Quick Filters option.

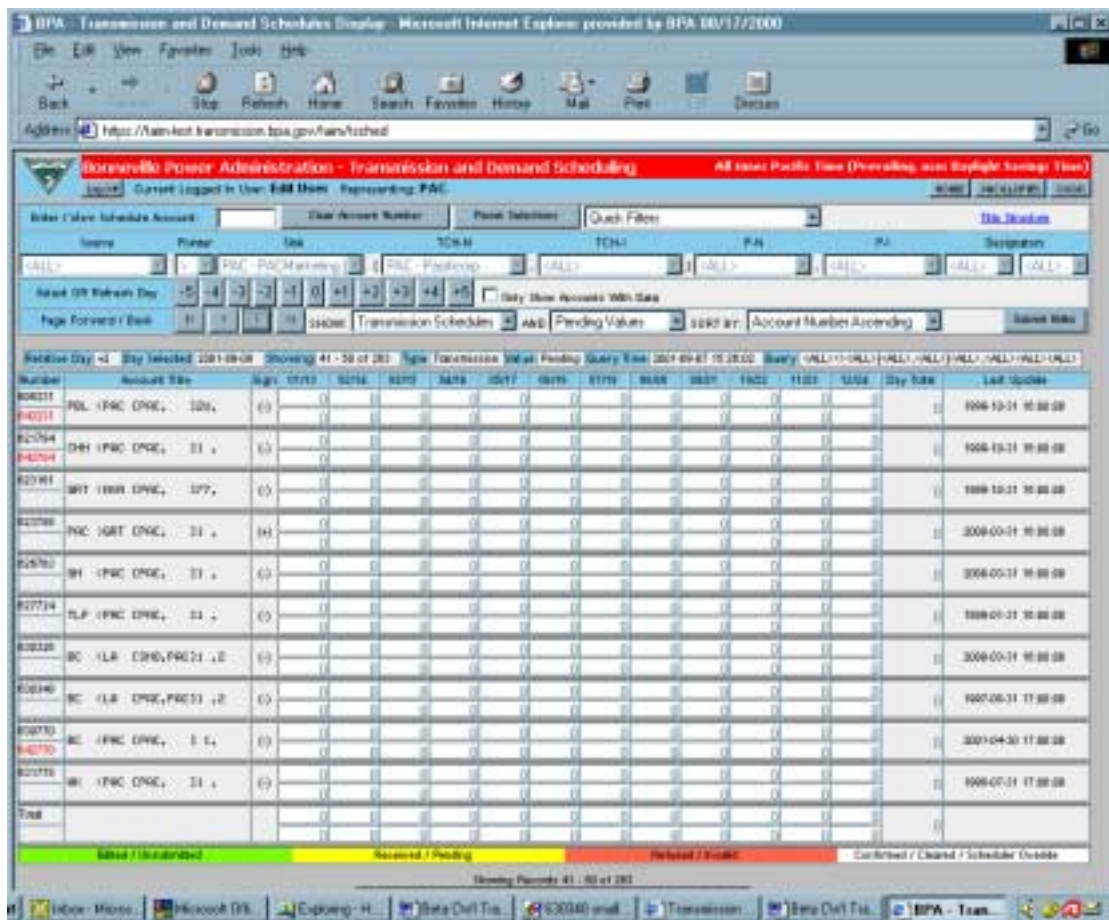
The following examples are where PAC is the Sink and TCH-N and TCH-I. Since the account number we are searching for has PAC as the Sink, not the Source, we will not be able to find it using PAC as the Source and TCH-N or TCH-I.

### 5.2.1 Where Your Company is the Sink and TCH-N


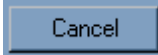
You may need to de-select the *Only Show Accounts With Data* option.

Step	Action	Screen Element
2a	Click on the <b>Quick Filters</b> pull down menu.	
2b	Select <b>Where PAC is the SINK and TCH-N</b> .	
2c	Click on the <i>day/date</i> . In this case, select <b>+2</b> .	
2d	Click on <b>&gt;</b> at <i>Page Forward / Back</i> until you find account number <b>630348</b> . The screen should look similar to the following.	

## Quick Filter Sink and TCH-N Screen

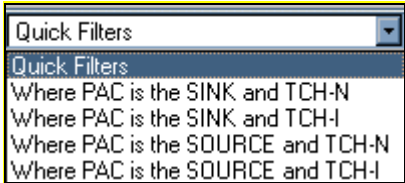





Step	Action	Screen Element
2e	Note you have located <b>630348</b> using the <i>Quick Filter</i> for PAC as the Sink and TCH-N.	
2f	Click on the <b>Reset Selections</b> button to proceed.	
2g	If you attempt another selection without using the <i>Reset Selections</i> button, a message window appears that is similar to this.	

Step	Action	Screen Element
2h	Select <b>OK</b> in this case.	
2i	If you have entered schedule edits, but have not submitted them, you may want to select <b>Cancel</b> .	

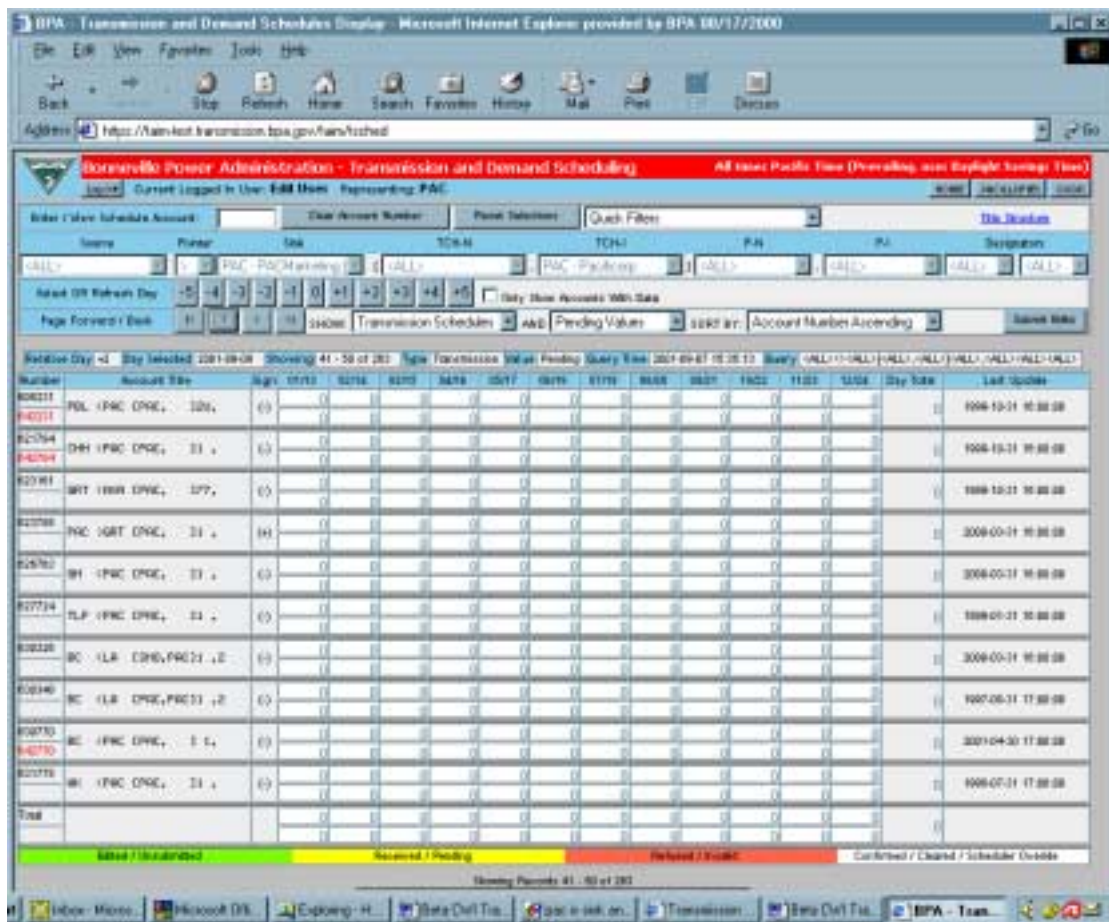
## 5.2.2 Where Your Company is the Sink and TCH-I

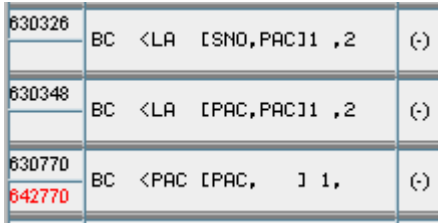
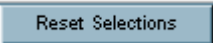
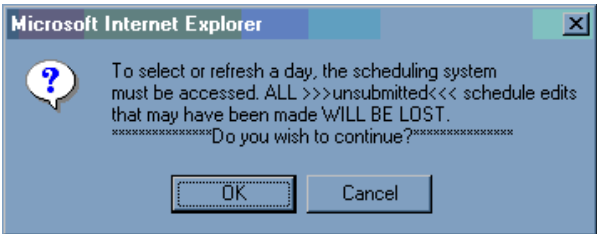
You may need to de-select the *Only Show Accounts With Data* option.

Step	Action	Screen Element
3a	Click on the <b>Quick Filters</b> pull down menu.	
3b	Select <b>Where PAC is the SINK and TCH-I</b> .	
3c	Click on the <i>day/date</i> . In this case, select <b>+2</b> .	
3d	Click on <b>&gt;</b> at <i>Page Forward / Back</i> until you find account number <b>630348</b> . The screen should look similar to the following.	


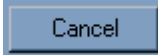


## Quick Filter Sink and TCH-I Screen



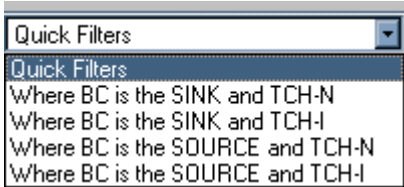

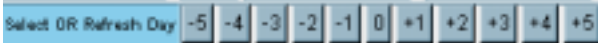
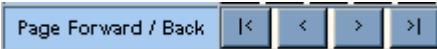
Step	Action	Screen Element
3e	Note you have located <i>630348</i> using the <i>Quick Filter</i> for PAC as the Sink and TCH-I.	
3f	Click on the <b>Reset Selections</b> button to proceed.	
3g	If you attempt another selection without using the <i>Reset Selections</i> button, a message window appears that is similar to this.	



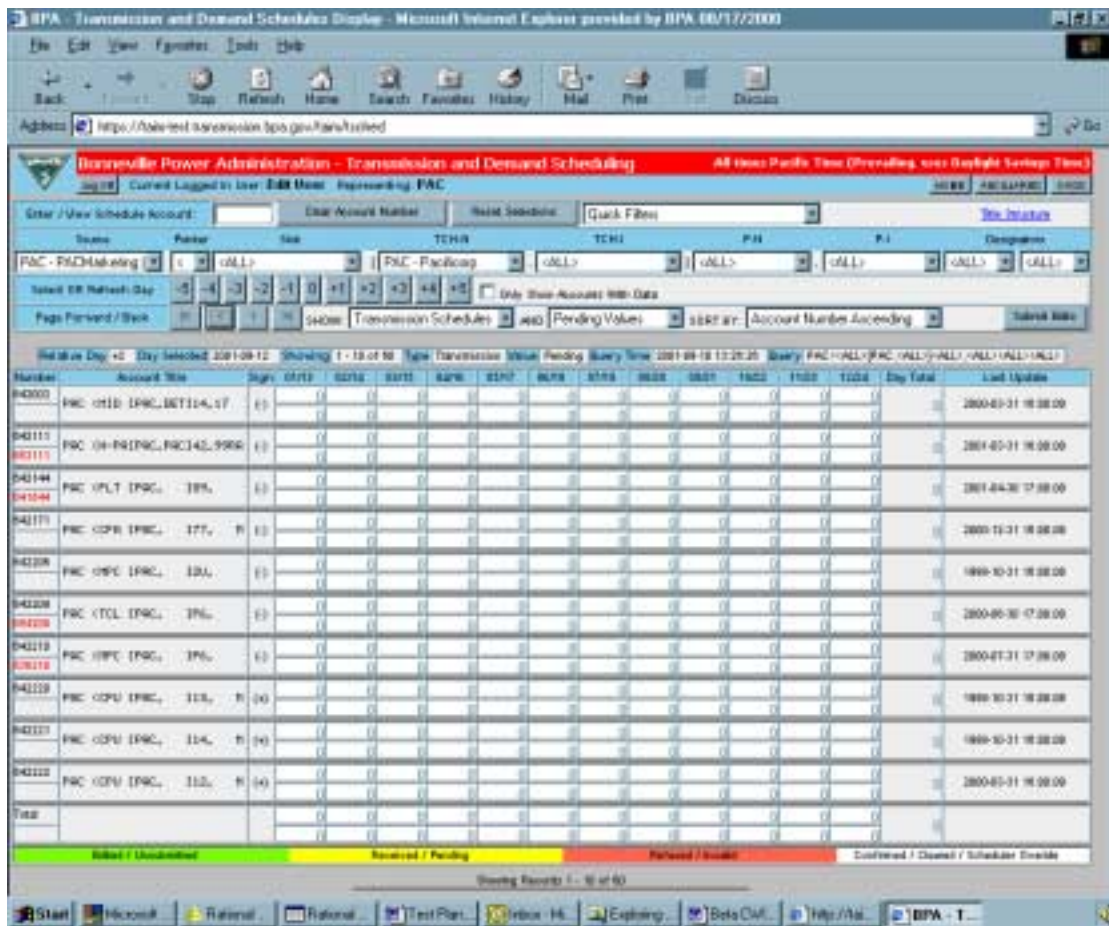
Step	Action	Screen Element
2h	Select <b>OK</b> in this case.	
3i	If you have entered schedule edits, but have not submitted them, you may want to select <b>Cancel</b> .	

### 5.2.3 Where Your Company is the Source and TCH-N


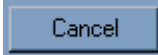
You may need to de-select the *Only Show Accounts With Data* option.

Step	Action	Screen Element
4a	Click on the <b>Quick Filters</b> pull down menu.	
4b	Select <b>Where PAC is the SOURCE and TCH-N</b> .	
4c	Click on the <i>day/date</i> . In this case, select <b>+2</b> .	
4d	Click on <b>&gt;</b> at <i>Page Forward / Back</i> to find account number <b>630348</b> . The screen should look similar to the following.	

## Quick Filter Source and TCH-N Screen

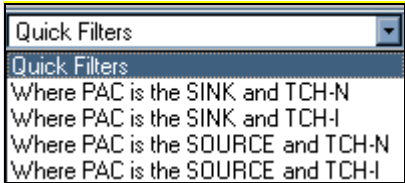





Step	Action	Screen Element
4e	Account number 630348 does not appear when you use the <i>Quick Filter</i> for PAC as the Source and TCH-N. PAC is the <i>Sink</i> , not the <i>Source</i> .	
4f	Click on the <b>Reset Selections</b> button to proceed.	
4g	If you attempt another selection without using the <i>Reset Selections</i> button, a message window appears that is similar to this.	

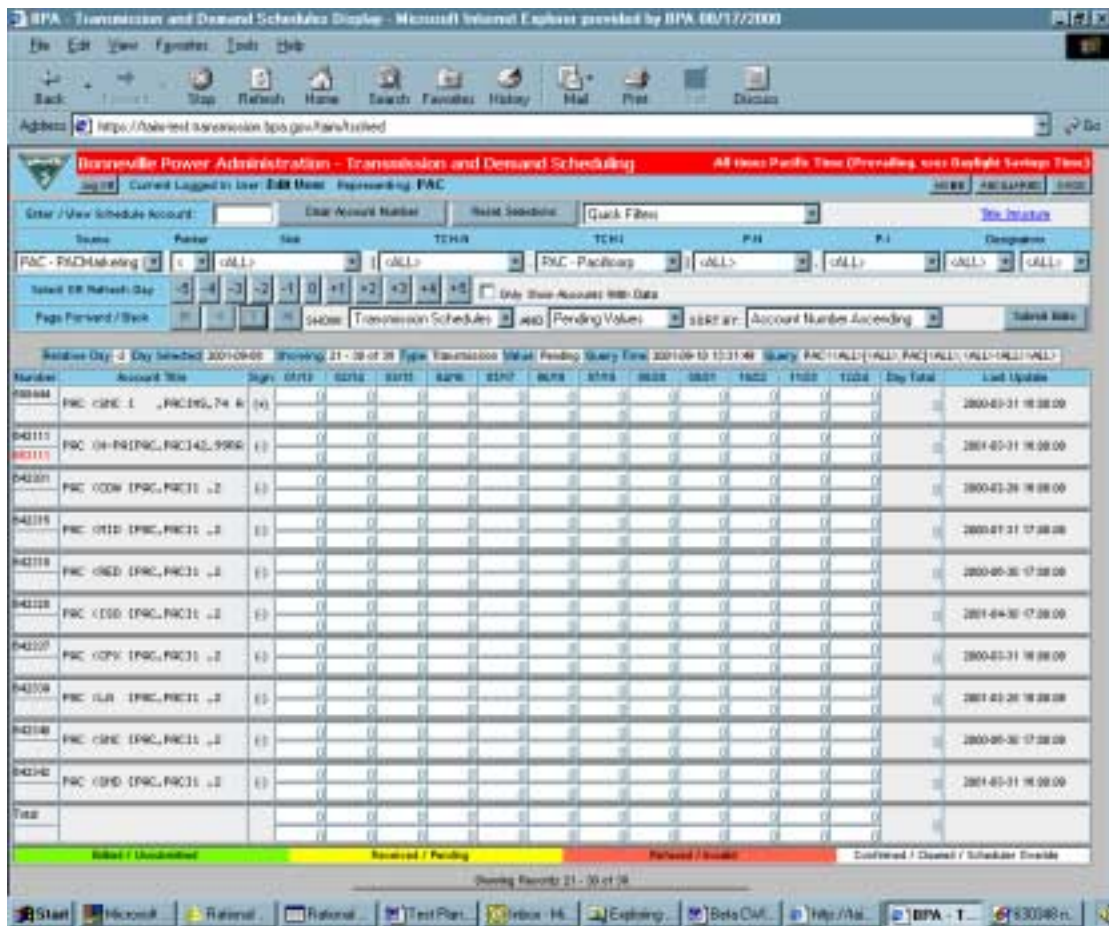
Step	Action	Screen Element
4h	Select <b>OK</b> in this case.	
4i	If you have entered schedule edits, but have not submitted them, you may want to select <b>Cancel</b> .	

## 5.2.4 Where Your Company is the Source and TCH-I

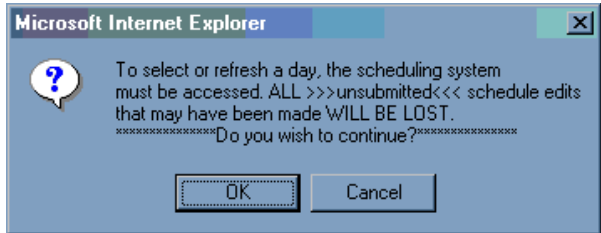

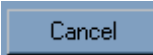
You may need to de-select the *Only Show Accounts With Data* option.

Step	Action	Screen Element
5a	Click on the <b>Quick Filters</b> pull down menu. Note that, in this case, you can readily go to: PAC as the Source and TCH-I.	
5b	Select <b>Where PAC is the Source and TCH-I</b> .	
5c	Click on the <i>day/date</i> . In this case, select <b>+2</b> .	
5d	Click on <b>&gt;</b> at <i>Page Forward / Back</i> to you find account number <b>630348</b> . The screen should look similar to the following.	

## Quick Filter Source and TCH-I Screen





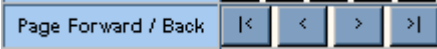
Step	Action	Screen Element																																										
5e	Account number 630348 does not appear when you filter using PAC as the Source and TCH-I. PAC is the <i>Sink</i> , not the <i>Source</i>	<div><div>Relative Day -2 Day Selected 2001-09-08 Showing 21 - 30 of 38</div><table><thead><tr><th>Number</th><th>Account Title</th><th>Sign</th><th>01/13</th><th>02/14</th><th>03/15</th></tr></thead><tbody><tr><td>598444</td><td>PAC &lt;SNC I ,PACINS,74 A</td><td>(+)</td><td>0</td><td>0</td><td>0</td></tr><tr><td></td><td></td><td></td><td>0</td><td>0</td><td>0</td></tr><tr><td>642111</td><td>PAC &lt;H-PACIPAC,PAC142,99RA</td><td>(-)</td><td>0</td><td>0</td><td>0</td></tr><tr><td>653111</td><td></td><td></td><td>0</td><td>0</td><td>0</td></tr><tr><td>642301</td><td>PAC &lt;CDW IPAC,PAC11 ,2</td><td>(-)</td><td>0</td><td>0</td><td>0</td></tr><tr><td></td><td></td><td></td><td>0</td><td>0</td><td>0</td></tr></tbody></table></div>	Number	Account Title	Sign	01/13	02/14	03/15	598444	PAC <SNC I ,PACINS,74 A	(+)	0	0	0				0	0	0	642111	PAC <H-PACIPAC,PAC142,99RA	(-)	0	0	0	653111			0	0	0	642301	PAC <CDW IPAC,PAC11 ,2	(-)	0	0	0				0	0	0
Number	Account Title	Sign	01/13	02/14	03/15																																							
598444	PAC <SNC I ,PACINS,74 A	(+)	0	0	0																																							
			0	0	0																																							
642111	PAC <H-PACIPAC,PAC142,99RA	(-)	0	0	0																																							
653111			0	0	0																																							
642301	PAC <CDW IPAC,PAC11 ,2	(-)	0	0	0																																							
			0	0	0																																							
5f	Click on the <b>Reset Selections</b> button to proceed.	<div>Reset Selections</div>																																										

Step	Action	Screen Element
5g	If you attempt another selection without using the <i>Reset Selections</i> button, a message window appears that is similar to this.	 A message window from Microsoft Internet Explorer with a blue background. It contains a question mark icon and the text: "To select or refresh a day, the scheduling system must be accessed. ALL >>>unsubmitted<<< schedule edits that may have been made WILL BE LOST. Do you wish to continue?". At the bottom are "OK" and "Cancel" buttons.
5h	Select <b>OK</b> in this case.	 A rectangular button with a dashed border and the text "OK" in the center.
5i	If you have entered schedule edits, but have not submitted them, you may want to select <b>Cancel</b> .	 A rectangular button with a solid border and the text "Cancel" in the center.

### 5.3 Filter Using <ALL>

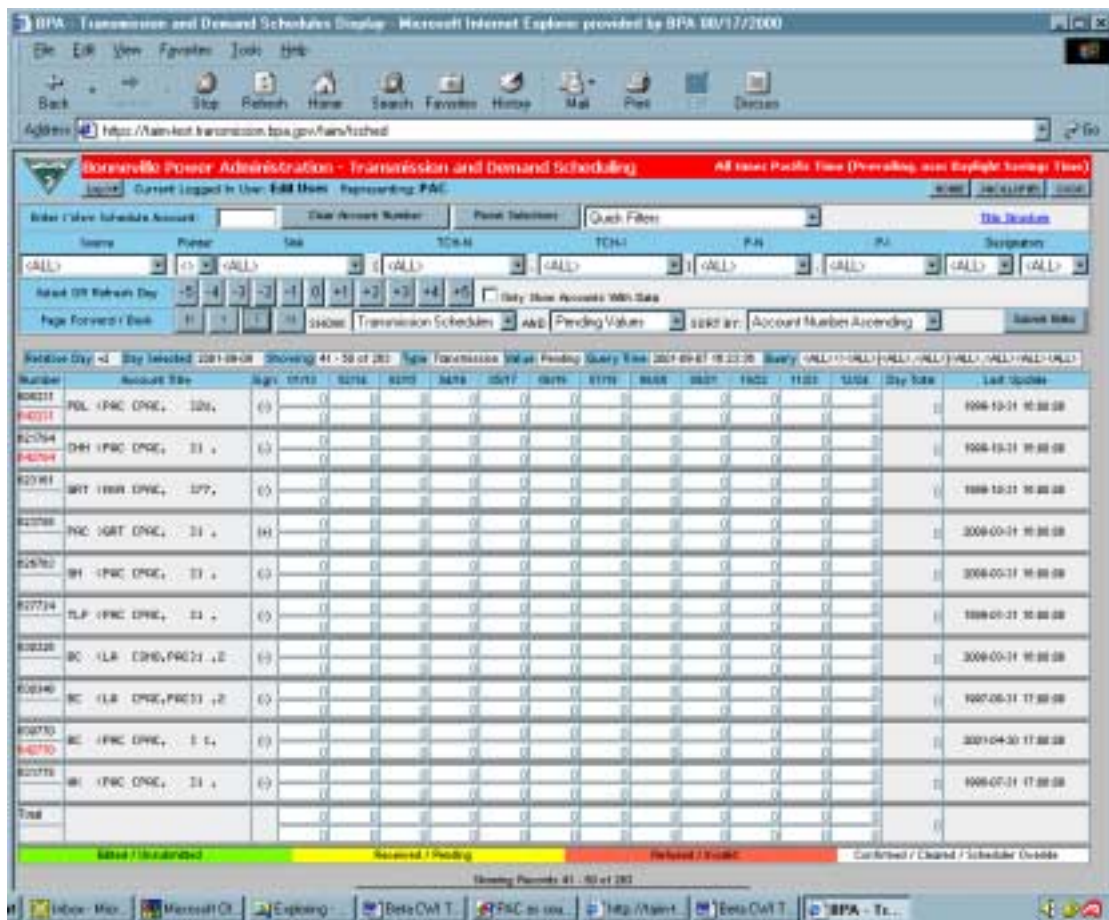
When you use the default <ALL> at each common data menu, the system lists all accounts. This may give you more information than you want or need.

You may need to de-select the *Only Show Accounts With Data* option.

Step	Action	Screen Element
6a	Leave all common data menu options at the default, <All>.	 A screenshot of a web interface showing a menu with several options, including "ALL" which is highlighted.
6b	Click on <b>Select Day +2</b> , in this case, to select the <i>day/date</i>	 A row of buttons labeled "Select OR Refresh Day" followed by buttons for days: -5, -4, -3, -2, -1, 0, +1, +2, +3, +4, +5. The "+2" button is highlighted.
6c	Click on > at <i>Page Forward / Back</i> until you find account number <b>630348</b> . The screen should look similar to the following.	 A button labeled "Page Forward / Back" followed by four navigation buttons:  <, <, >, and > .




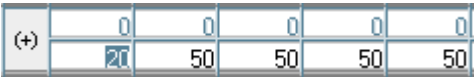
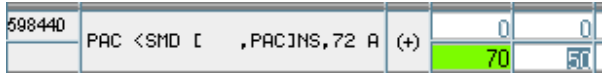
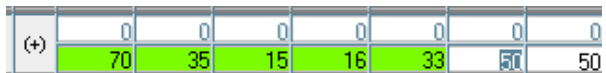
## <ALL> and Date Selected Screen








Step	Action	Screen Element												
6d	Note you have located <i>630348</i> using <b>&lt;All&gt;</b> .	<table border="1"> <tr> <td>630326</td> <td>BC &lt;LA [SN0,PAC]1 ,2</td> <td>(-)</td> </tr> <tr> <td>630348</td> <td>BC &lt;LA [PAC,PAC]1 ,2</td> <td>(-)</td> </tr> <tr> <td>630770</td> <td>BC &lt;PAC [PAC, 1 1,</td> <td>(-)</td> </tr> <tr> <td>642770</td> <td></td> <td></td> </tr> </table>	630326	BC <LA [SN0,PAC]1 ,2	(-)	630348	BC <LA [PAC,PAC]1 ,2	(-)	630770	BC <PAC [PAC, 1 1,	(-)	642770		
630326	BC <LA [SN0,PAC]1 ,2	(-)												
630348	BC <LA [PAC,PAC]1 ,2	(-)												
630770	BC <PAC [PAC, 1 1,	(-)												
642770														
6e	Click on the <b>Reset Selections</b> button to proceed.	<div>Reset Selections</div>												

## 6 Editing Schedules

You can edit a MW value in the hourly fields if the values currently there are in black. You cannot edit fields with blue values.

Step	Action	Screen Element
1	In the MWLevel field for hour 02, there is a blue rectangle. This is what you see when you try to enter a new value in a field with blue values.	
2	You can edit a MW value in the hourly fields only if the current values are black. When you click in a field, a blue rectangle appears, but the current number is still visible.	
3	Type a different number here. Press the <b>Tab</b> or <b>Enter</b> key on your keyboard, or click in another field.	
4	You can type the appropriate numbers individually in any field with black numbers. When you click in another field, or press the <b>Tab</b> or <b>Enter</b> key on your keyboard, the field with the new value entered turns green. This indicates that you have edited the field, but have not submitted it yet ( <i>Edited/Unsubmitted</i> ).	

Step	Action	Screen Element
5	There is a shortcut for entering the same number in multiple consecutive fields. Type the value, an asterisk, and the number of fields where you want this value entered. In this case, enter 20*7 for entering 20 MW for 7 consecutive hours.	
6	Press the <b>Tab</b> or the <b>Enter</b> key on your <i>keyboard</i> . The background for the seven consecutive fields is now green.  Note that the system added a – sign in front of each value, since this is a – account. The system corrects your entry according to the +/- in the <i>Sign</i> column. This is a time saver, since you will not need to enter the – sign.	
7	Enter 17*5 at a + account, press <b>Enter</b> or <b>Tab</b> on your <i>keyboard</i> , and get these results.  Since this is a + account, there is no sign in front of the numbers.	
8	The <i>Totals</i> row at the bottom of the screen shows the Edited/ Unsubmitted totals in green.  If you log out of the system with fields whose backgrounds are green, you lose your edits.	
9	Click on the <b>Submit</b> button. The green fields turn yellow to indicate they are now <i>Pending</i>	





## Submitted Values

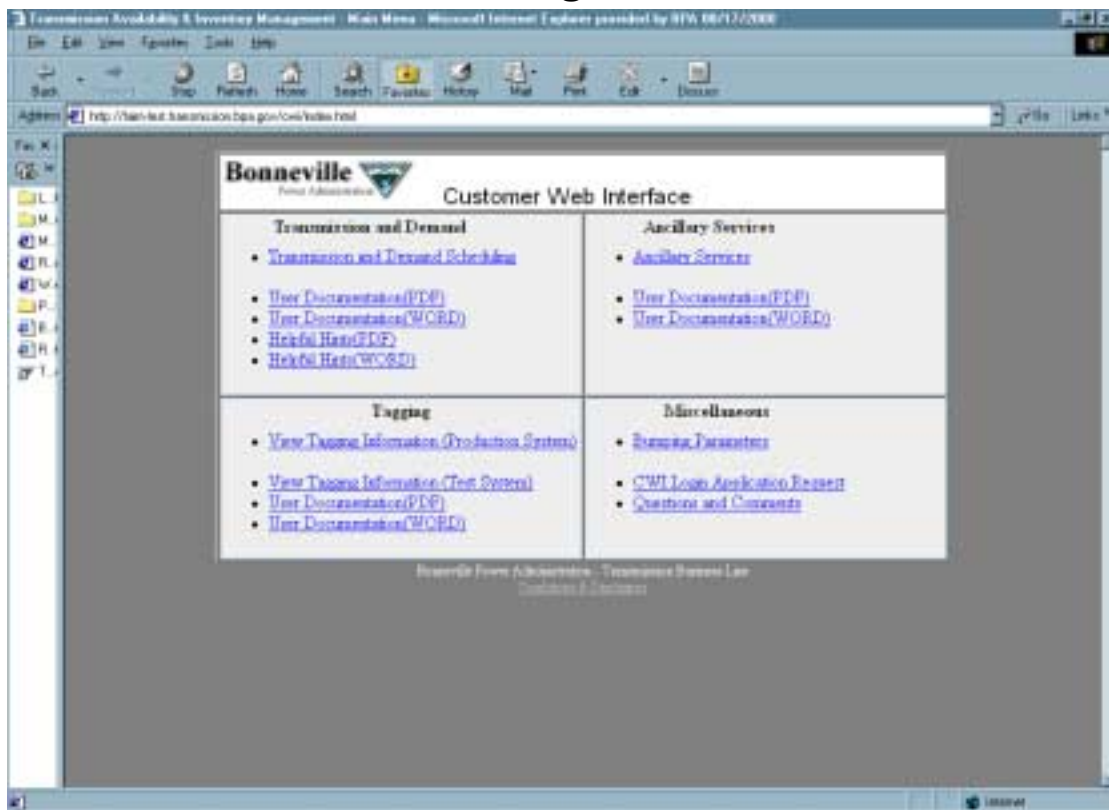
Step	Action	Screen Element
10	Note that some hour totals have a background that is: <ul style="list-style-type: none"> <li>Yellow - <i>Received/Pending</i></li> <li>Red - <i>Refused/Invalid</i></li> <li>White - <i>Confirmed/Cleared/Scheduler Override</i></li> </ul>	
11	<i>Pending</i> values display when you select the <b>Pending</b> Values option, and <i>Operational</i> values display when you select <b>Operational</b> Values.	

## 7 Other Features of the Contract Holder View Screen

There are useful features on the Contract Holder View screen other than those already covered.

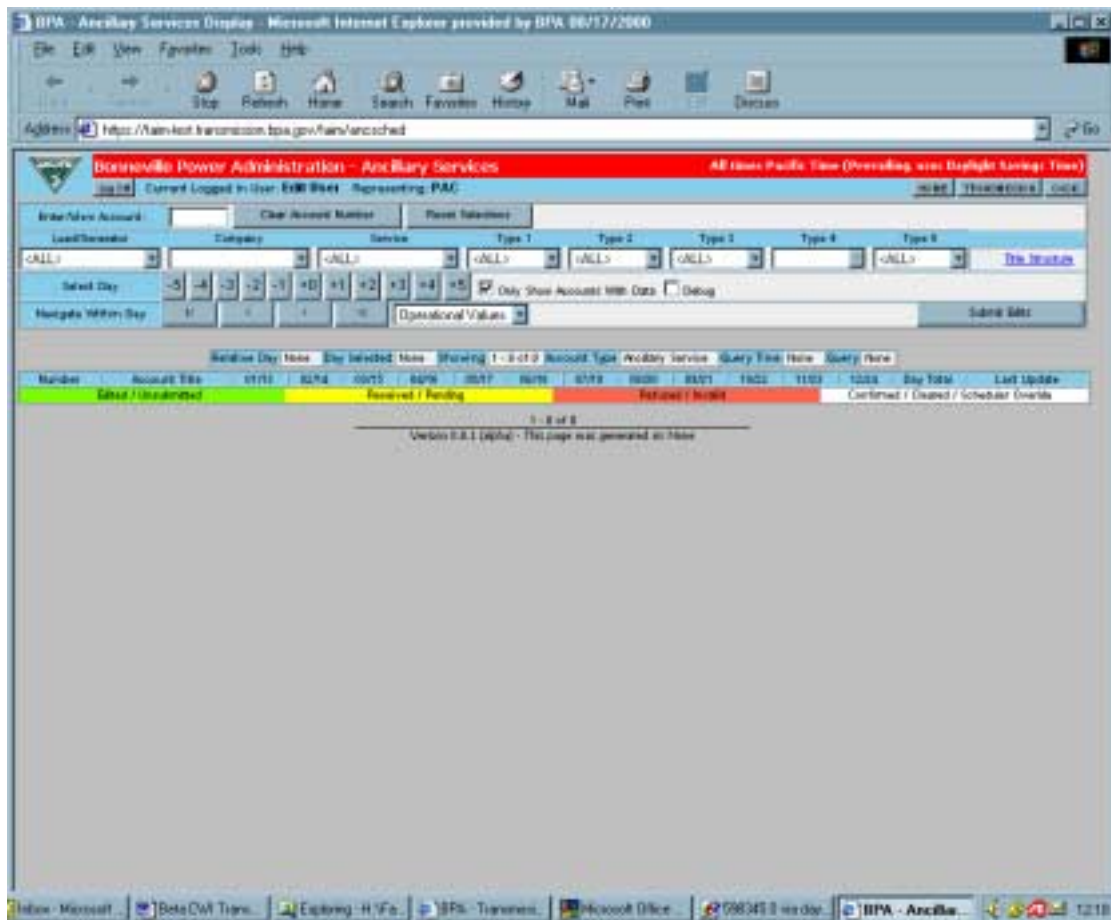
Action	Screen Element
Click on the <b>Log Off</b> button to log off the system.	
View the bar to the right of the <i>Log Off</i> button to verify your log on status.	Current Logged In User: <b>Bennett, Mary</b> Representing: <b>PPM</b>
Click on the <b>Home</b> button on the same line, on the far right. It takes you to the <i>Home Page</i> screen, which is similar to the following.	



### Home Page Screen






Action	Screen Element
Click on the <b>Ancillary Services</b> hyperlink to go to the <i>Ancillary Services Displays</i> screen.	<ul style="list-style-type: none"> <li><a href="#">Ancillary Services</a></li> </ul>

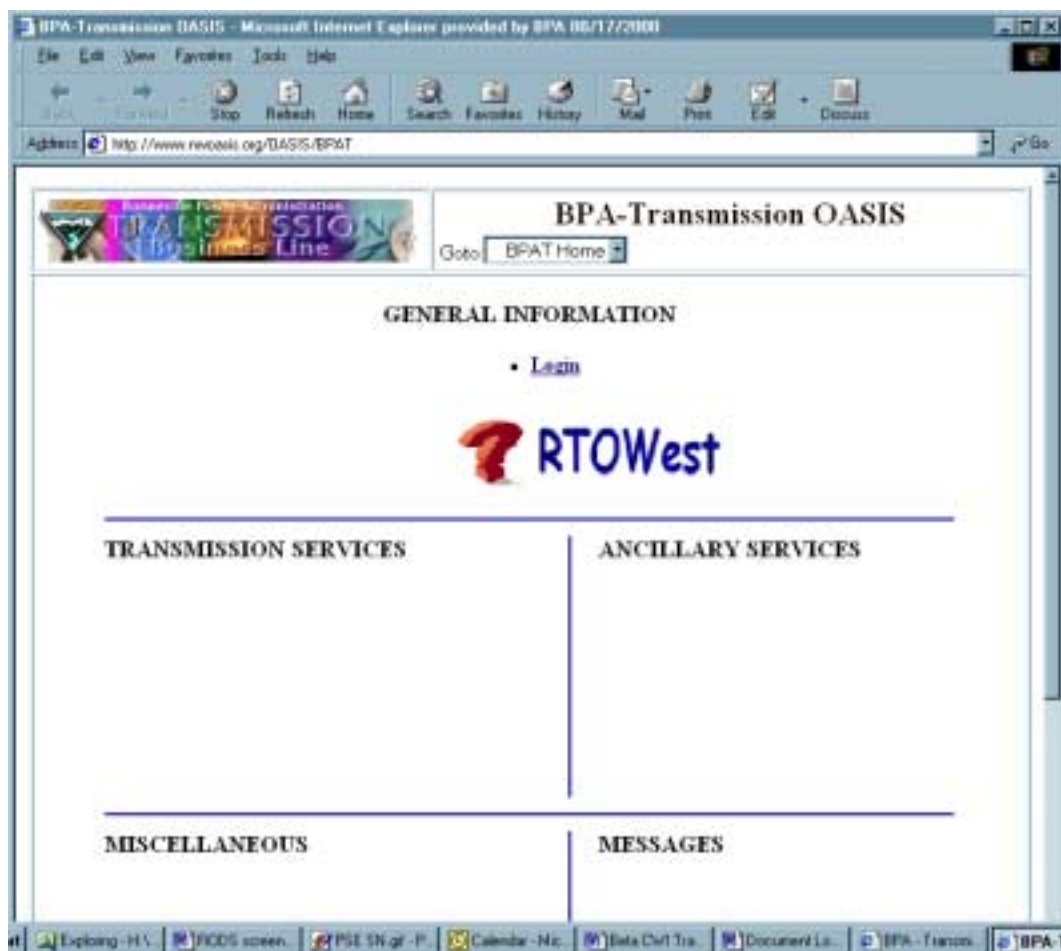
## Ancillary Services Display




Action	Screen Element
You can click on the <b>Log Off</b> button to leave the <i>Ancillary Services Display</i> screen.	
You can click on the <b>Transmission</b> button to go from the <i>Ancillary Services</i> screen to the <i>Transmission and Demand</i> screen.	

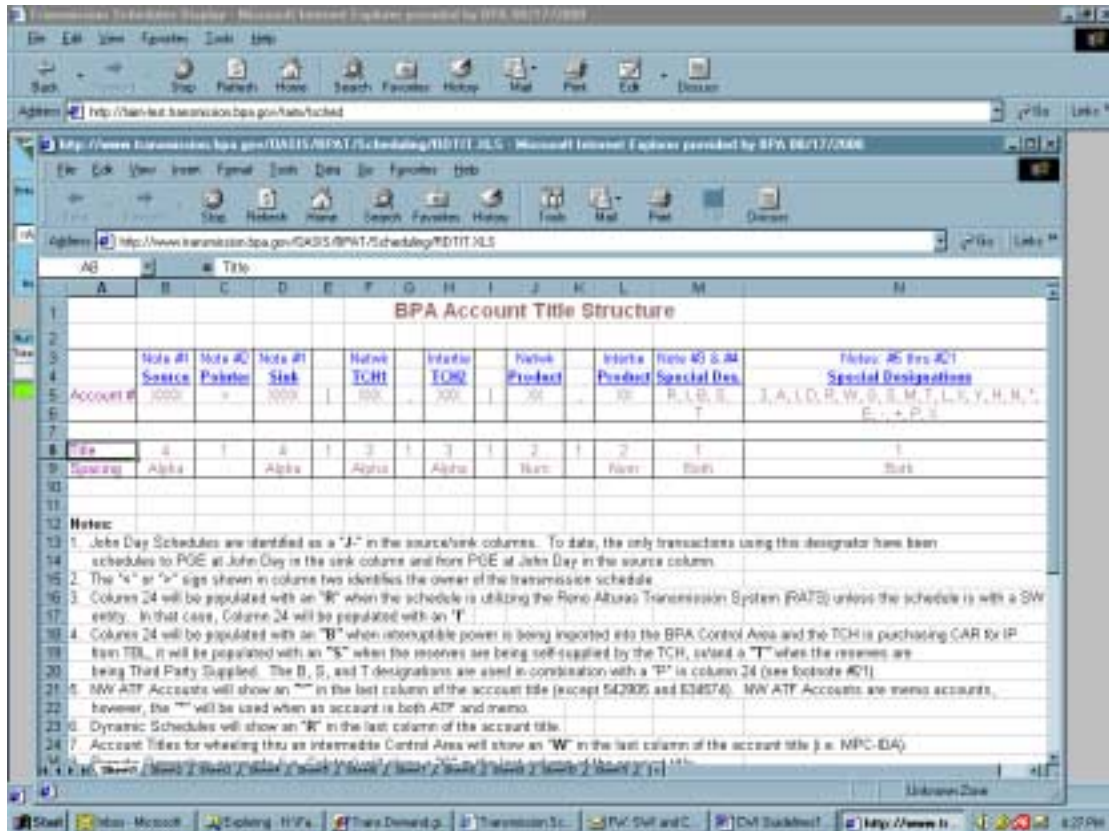
Action	Screen Element
Press the <b>Ancillaries</b> button when you are at the <i>Transmission and Demand</i> screen. It takes you to the <i>Ancillary Services</i> screen.	
You may want to minimize the <i>Ancillary Services</i> screen.	
Click on the <b>OASIS</b> button to go to the OASIS screen, which is similar to the following.	

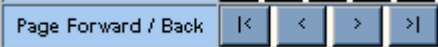


### OASIS Screen






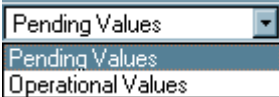
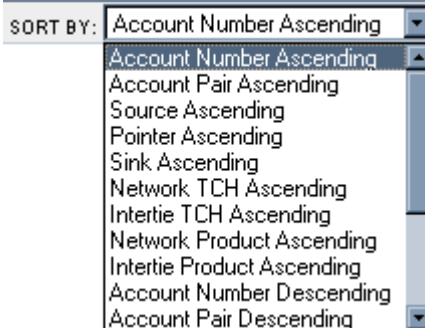
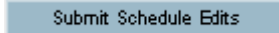
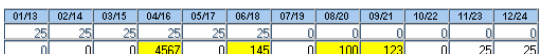
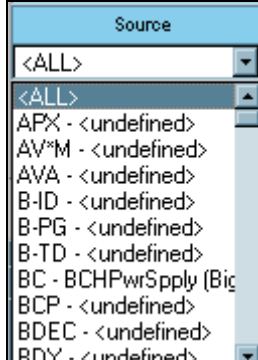
Action	Screen Element
Click on the <b>Title Structure</b> hyperlink, below the <i>HOME</i> and <i>OASIS</i> buttons, for information about the structure of BPA's account titles. A screen appears that is similar to the following.	

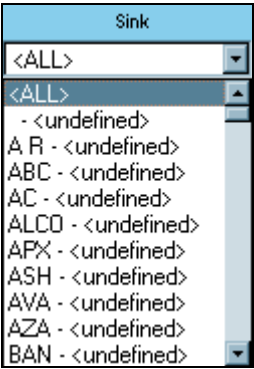
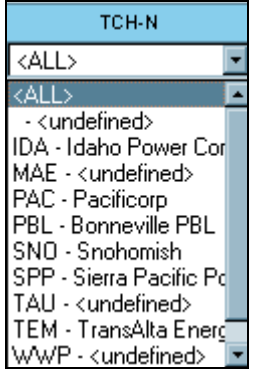
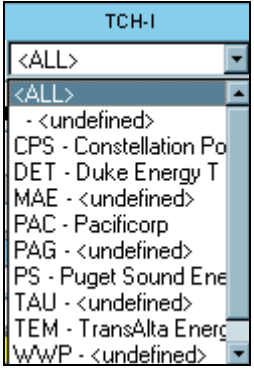
### Title Structure Screen



Action	Screen Element
Use the <b>Page Forward/Back</b> buttons to display additional accounts when choices from the drop down menus resulted in more than 10 accounts.	
Use this button to go to the first subset of 10 accounts.	
Use this button to go to the last subset of 10 accounts.	



Action	Screen Element
10 accounts.	
Use this button to go to the next lower subset of 10 accounts.	
Use this button to go to the next higher subset of 10 accounts.	
Open this pull down menu to select <i>Transmission Schedules</i> or <i>Demand Schedules</i> .	
Open this pull down menu to select <i>Pending Values</i> or <i>Operational Values</i> .	
Use this pull down menu to select the method you want to <i>Sort By</i> .	
You can edit schedules and submit the edits on this screen. Use the <b>Submit Schedule Edits</b> button to submit your edits.	
Use your <b>Tab</b> or <b>Enter</b> key to go from hour to hour on the screen.	
You can filter using the <b>Source</b> pull down menu.	

Action	Screen Element
You can filter using the <b>Sink</b> pull down menu.	
You can filter using the <b>TCH-N</b> pull down menu.	
You can filter using the <b>TCH-I</b> pull down menu.	

## 8 Hints / Tricks / Frequently Asked Questions

1. If you want to enter the same value into multiple contiguous hours of an account, you can easily do so by using a "value\*multiplier" syntax. For example, if you want to enter 50 into HE4 through HE20, select hour HE4 and enter "50\*17" and press the "enter" key. The effect will be to place the number 50 into the current hour (HE4) and the next 16 hours for a total of 17 hours. The cursor will be on HE21 when the operation is complete.
2. You can use the "enter" or "tab" key to move from hour to hour in an account. If you do not enter a new number, the existing number will remain in the hour field. You can hold down the "tab" or "enter" key to automatically move forward through multiple hours.
3. The display will automatically correct the sign of any values entered. For example, if an account should have negative numbers in it and you enter a positive value, the value will automatically change to a negative value. The same is true if you enter a negative number into a positive account, it changes to a positive value.
4. When making edits on a display with more than 10 accounts in it, you can move forward and back through the accounts, 10 at a time, using the "Page Forward / Back" buttons without losing your edits. When you have finished making all of your edits, press the "Submit Edits" button. Even though some edits may be on a different page, they still submit.
5. If the checkbox titled "Only Show Accounts With Data" is not checked, ALL accounts that you are eligible to view will be returned, regardless of whether they contain data.  
**Note:** Even though the account may not have data in it, it displays with zero (0) values. When you unselect this box, it is advisable to use the filter selections to limit the number of rows returned.
6. The filter drop down boxes greatly reduce the number of accounts returned and speed up the display. If you know the source, sink, or other information about the account(s) you are looking for, always try to select them from the title drop down boxes.
7. When you change a value in a cell, the background turns green and the hour on the total row also turns green. If any hour on any one of the pages (if more than 10 accounts are returned) has been edited, the total for that hour will be green.
8. If any hour on any page has a status of Refused/Invalid, i.e., red, or received/pending, i.e., yellow, the total for the hour will also be red or yellow, depending. Green has precedence over red, which has precedence over yellow.
9. When the display is first called up, it defaults to day zero (0). If you type an account number in and press enter, the account will be returned (if it exists) for day zero. If you select a different day (-5 to +5), that same account will be returned for the new day selected.
10. If you are currently looking at day +1, when you type in an account number and press enter, the new account number will also be returned for day +1. If you then select day



zero (0), the display will return the account for day zero (0). When you type yet another account in and press enter, it will be returned for day zero. Essentially the display will “stick” to whichever day you select.

11. Even if you have not made any edits, you can refresh the display by selecting the “submit edits” button. The added benefit of doing this is that the current page you are on will be maintained and refreshed. However, it may take longer to refresh than if you had selected a +5 to -5 buttons. Moreover, any edits that may have been made WILL be submitted.
12. The display does NOT automatically refresh itself when statuses or values are modified on the scheduling system. You must manually refresh the display by selecting one of the -5 to +5 buttons or the “Submit Edits” button.
13. It can take several minutes to process a large submittal of values and it may be necessary to refresh the display several times (or wait a minute or two) before you see all values and status in their final state.